

Solutions

STRATEGIC BUSINESS SOLUTIONS



DaszkalBolton LLP

CERTIFIED PUBLIC ACCOUNTANTS

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PALM BEACH
BROWARD

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STRATEGIC BUSINESS SOLUTIONS

Your success is our business. As a business owner, you must look to the future, plan for growth and cope with day-to-day business demands. You also have the responsibility to find the resources to help you – those individuals who provide experience, information and guidance tailored by thorough knowledge of the special needs of growing businesses. We have the resources available to assist you with the growth and profitability of your business.

Since your business is unique, we tailor our services and recommendations to your specific situation. Our strategic advisors have the experience and knowledge to identify areas for improvement, propose creative solutions, and help you interpret your business' data so that you can make meaningful business decisions.

The needs of our clients are diverse. Some require assistance in identifying and correcting inefficiencies in procedures and processes; other need improved financial reporting mechanisms to help them track cash flow; others desire improved owner compensation and liquidity. We are equipped and able to assist in each of these situations and much more.

Our professionals have identified some key areas where we can provide you special services to enhance your opportunities for positive results. A few of these key areas include:

- Business structure analysis
- Financial reporting, including flash reports
- Business plan development
- Accounting system evaluation, implementation and training
- Cash flow projections
- Production and inventory control techniques
- Financial statement analysis and interpretation
- Assistance with financing relationships
- Credit and collections policies
- Historical financial analysis
- Cash management procedures
- Executive compensation evaluation
- CFO and Controller executive searches

Our strategic advisors have the experience and knowledge to help you in all areas of your business. Daszkal Bolton's team-oriented approach to client service allows us to bring in the most appropriate professionals to assist you with your company's specific needs. Our business consulting partners, White Knight Solutions, often participate in providing strategic solutions, particularly in the areas of financing and mergers and acquisitions.



SBS Services:

Fractional CFO

QuickBooks®

Executive Search

Bookkeeping

Accounting Support

FRACTIONAL CFO SERVICES

A “Fractional Chief Financial Officer” is a concept developed around the idea that while small and middle-market companies often need the high-level, sophisticated expertise that a seasoned executive can provide, you may not need it on a daily basis. Retaining a financial executive on a fractional, as-needed basis is the solution, enabling you to share the expertise and cost of a CFO without adding to your overhead. This affordable solution works well for companies that need expertise periodically, rather than every day. Any business owner facing time or internal resource constraints can reach for this tool and get an excellent return on investment.

One of the benefits of a fractional CFO is that you establish a relationship with the executive and he/she becomes a part of your team, even if only intermittently throughout the year. You will not need to retrain a new individual every time you need help – the fractional CFO has a deep understanding of your business, your culture and your goals, and is able to use that accumulated knowledge to help your business succeed on an as-needed, recurring basis.

Many companies need this support and do not realize it, usually because the owner is absorbed in the daily issues of running the business. A fractional CFO can:

- ✓ Take full advantage of an opportunity
- ✓ Plan for growth
- ✓ Budget for the coming year
- ✓ Investigate an acquisition
- ✓ Deal with regulators
- ✓ Assist in the acquisition of bank or equity financing
- ✓ Set up financial reporting systems
- ✓ Spearhead an initiative
- ✓ Reduce expenses
- ✓ Provide you with more free time to improve your quality of life

The fractional executive can bring a higher level of sophistication to the financial issues that your business faces. More importantly, fractional ownership of the right CFO can translate into fractional ownership of and priority access to many experts capable of assisting your business become more successful, more profitable, more effective and more personally rewarding. The right CFO connection can be your quarterback for an extremely powerful team of “rented experts” on an as-needed basis. Any business owner facing time or resource constraints cannot afford to ignore this solution.



Customized consulting packages are available, based on your company's specific needs. Consulting services are available at a 5% discount when the first 20 hours of services are pre-paid.

Hourly rates range from \$175 - \$225.

Daily rates are \$1,250 per day.

PROFIT BUILDER SERVICES

Daszkal Bolton's Profit Builder Analysis is an extensive review of the financial health of your company. Our strategic business advisors who serve as fractional CFO or outsourced controllers perform this service. Through this in-depth analysis, you will receive detailed information about your cash management, inventory controls, profit margins, debt structure, working capital, accounts receivable, and growth potential. There are several danger signs of financial distress that we will carefully investigate, including seasonal cash fluctuations, financial reporting, accounting procedures, accounts payable, and payroll, to name just a few.

We will identify possible symptoms of financial malaise and provide a comparative analysis with recommendations for remedies you can implement to improve the overall health of your business in a dashboard-style report. The analysis will highlight any areas that have a negative effect on your company, isolate the cause and effect relationships, implement "what if" scenarios to see the results of recommended remedies, and offer a plan of action to cure the ailments. This executive tool is available for \$2,950.

ACCOUNTING FITNESS REPORT

Our Accounting Fitness Report is an analysis of your current accounting system, obtained through interviews with you and your staff, a review of your accounting software file(s), a review of your reporting requirements, and other procedures that may be necessary for your specific circumstances.

We will evaluate and document your accounting system's strengths and weaknesses, providing a written, easy-to-understand recommendation report of accounting and software matters that require your attention. Each aspect is listed individually on the report with its level of importance to improving your accounting system's accuracy and efficiency, or total financial health. Our Accounting Fitness Report is a cost-effective tool that may help you discover how to improve your overall accounting condition and is available for \$475.

QUARTERLY ACCOUNTING FITNESS REVIEWS

We are also available to provide quarterly reviews on the health of your accounting files and utilization. You may want to measure the progress you have made each quarter, receive recommendations for enhancing your data and reporting, or obtain feedback on new tools and features you are using. We will schedule quarterly reviews at your convenience to help you maximize your success. You will receive an on-site visit and a comprehensive, easy-to-understand Accounting Fitness Report to gauge that success. Quarterly fitness reviews may be purchased individually for \$350 per quarter, or annually for a discounted rate of \$1,295.



\$2,950
Profit Builder

\$475
Accounting Fitness Report

\$350
Quarterly Fitness Review

\$1,295
Annual Quarterly Reviews



OUR QUICKBOOKS® SERVICES

The professionals at Daszkal Bolton know how important it is to have an accounting system you can rely on, that offers you the tools you need to gauge and grow your business' success. We are intimately involved with your business, its processes and accounting goals, so we are better equipped to answer your QuickBooks® and accounting questions. With other services, you never know whom you will get on the phone or how sound the advice will be.

We provide per diem consulting as well as recurring services for a variety of accounting software packages, including QuickBooks® (Basic, Pro, Enterprise, Premier, Online, Accountants' Edition, and Point of Sale). For more information on our Great Plains, Peachtree, Business Works or other accounting software services, please call us. We stand ready to assist you with all of your accounting software needs.

Many of our strategic business advisors are Certified QuickBooks® Pro Advisors, and all of our team members have the business and accounting experience to champion your company and help you achieve the next level of success. We offer a full tier of services for businesses of all sizes, who either already use QuickBooks® or who need to implement a new accounting software program to adapt to expansion and growth. If our consulting packages do not match your specific needs, we can create a custom plan to meet your individual requirements. In addition, you may wish to take advantage of our Annual Support Services, which offer you the flexibility to call us whenever you have a question, concern, or need QuickBooks® advice.

QUICKBOOKS® FIELD GUIDE

We have created a step-by-step user's guide that is available for purchase for \$95. This essential tool is also included in each of our QuickBooks® Consulting Packages. It includes 14 easy-to-follow lessons, walking you through initial set-up, showing you how to use each feature of the program with diagrams, and concludes with some tips and tricks that you may not learn on our own. We recommend that all users obtain a copy of this valuable resource.

QUICKBOOKS® REAL ESTATE INVESTOR TEMPLATE

For real estate investors, organizing and setting up your accounting procedures can be a time-consuming task. We have created a customized real estate QuickBooks® template (software) and corresponding user manual to assist you with month-end accounting and reporting, general accounting tasks, and year-end accounting procedures. By following the model provided, QuickBooks will provide you with the information needed to make informed decisions quickly and timely. To minimize the time you spend on accounting for your real estate activity and maximize your time to focus on earning more revenue, purchase a real estate template today for \$500.

\$95

*Daszkal Bolton's
QuickBooks Field Guide*

\$500

*Daszkal Bolton's
QuickBooks® Real Estate Template*

QUICKBOOKS® CONSULTING SERVICES

QUICKBOOKS SET-UP – LEVEL 1

Our Level 1 Package has been designed for individuals who would like assistance in installing QuickBooks® for rapid and effective use. Typical QuickBooks® startup consulting activities at this level may include the following:

- ✓ Four hours* of onsite consulting
- ✓ Customized or built up chart of accounts
- ✓ Guidance on entering opening balances
- ✓ Accounts payable (up to 15 bills)
- ✓ Accounts receivable (up to 15 invoices)
- ✓ Customized sales form design (one)
- ✓ Sales tax tracking for Florida
- ✓ One hour of telephone support
- ✓ Daszkal Bolton's QuickBooks® Field Guide

QUICKBOOKS SET-UP – LEVEL 2

Our Level 2 Package was developed for individuals who would like additional expertise in getting their accounting software installed for instantaneous and efficient use. The Level 2 Package includes 7 hours* of onsite consulting, all of the services from the Level 1 Package, plus the following additional services:

- ✓ Inventory (up to 15 inventory parts)
- ✓ Payroll (calendar year-end, up to 20 employees)
- ✓ Monthly binder and checklist

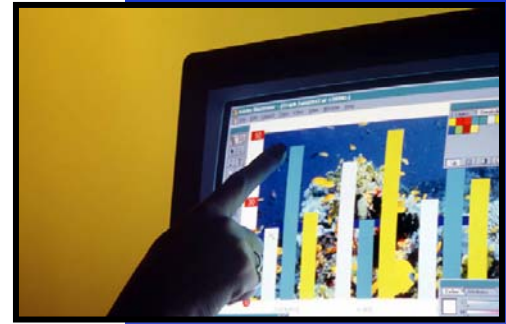
QUICKBOOKS SET-UP – LEVEL 3

Our Level 3 Package is recommended for companies with three or more QuickBooks users and for business owners who wish to use QuickBooks® as a management tool immediately. This service package includes 14 hours* of onsite consulting. The Level 3 Package includes all of the services from the Level 1 and Level 2 Packages, plus:

- ✓ Networking the company file
- ✓ An initial Accounting Fitness Report
- ✓ A second Accounting Fitness Report at your discretion to monitor and gauge progress
- ✓ Reporting set-up, including balance sheet, P&L by class or job, budget and cash flow

Additional QuickBooks consulting is available on an hourly basis. Rates range from \$115 to \$225 per hour, depending on the complexity of the issue.

*The actual amount of onsite consulting time required will depend upon your specific business needs.



Customized consulting packages are available, based on your company's specific needs. Consulting services are available at a 5% discount when the first 20 hours of services are pre-paid.

Hourly rates range from \$115 - \$225.

\$495

QuickBooks Set-up Level 1

\$795

QuickBooks Set-up Level 2

\$1,495

QuickBooks Set-up Level 3

QUICKBOOKS® POINT OF SALE SERVICES



Customized consulting packages are available, based on your company's specific needs. Consulting services are available at a 5% discount when the first 20 hours of services are pre-paid.

Hourly rates range from \$115 - \$225.

BASIC INSTALLATION PACKAGE

- ✓ Installation of QuickBooks® Point of Sale software (purchased by the client) on one computer/register
- ✓ Configuration of company name, address, zip code and telephone number
- ✓ Entry of one sales tax code

\$100

Basic Installation

HARDWARE BUNDLE INSTALLATION PACKAGE

- ✓ Basic Installation (see above)
- ✓ Installation of Point of Sale hardware (purchased by client) on one computer/register:
 - Steel cash drawer
 - Magnetic credit card reader
 - Bar code scanner
 - Receipt printer
- ✓ Testing of each component for functionality

\$200

Hardware Bundle Installation

\$125 per hour

POS Consulting Services

ADDITIONAL POS CONSULTING SERVICES

- ✓ Set up company data file
- ✓ Integration with QuickBooks® accounting software
- ✓ Set up merchant services
- ✓ Set up security rights and password controls
- ✓ Set up inventory and assembly items
- ✓ Set up bar coding, serial number tracking, price levels
- ✓ Sales tax codes
- ✓ Set up vendors and reorder points
- ✓ Set up customers
- ✓ Format tag/label
- ✓ Transfer data from previous POS
- ✓ Training your staff on recording levels, lay-a-ways and orders, purchases, receiving inventory and creating reports
- ✓ Data clean-up
- ✓ Style grids
- ✓ End-of-Day procedures



QUICKBOOKS® TRAINING WORKSHOPS

The QuickBooks® advisors in our Strategic Business Solutions Group have the business and accounting experience to help your company reach the next level of success. We offer you much more than software installation – we offer you the opportunity to enhance your profitability, reduce your expenses, protect your assets and improve your business processes.

We provide two QuickBooks® training workshops to help you get started. **MANAGING YOUR BUSINESS WITH QUICKBOOKS® PART 1** covers the following material:

- ✓ **Introduction to QuickBooks:** Protecting and sharing data, backing up and restoring data, QuickBooks releases, Accounting 101
- ✓ **Managing Revenue:** Invoicing, customer returns and credits, customer payments, bad debt, customer statements, finance charges, sales reports
- ✓ **Managing Expenses:** Entering and paying bills, class tracking, vendor set-up and lists, printing checks, tracking loans, handling vendor refunds, petty cash, credit cards
- ✓ **Bank Reconciliation:** Reconciling bank accounts, bank reconciliation, finding errors during bank reconciliation, handling bounced checks, reconciling credit cards, beginning balances on accounts
- ✓ **Reports and Graphs:** Cash vs. accrual, accounting reports, business management reports, graphs, building custom reports, memorizing reports, processing multiple reports, exporting reports
- ✓ **Company File Maintenance, Set-up and Customization:** Set-up process, adjusting opening balances, users and passwords, customizing icons and windows, items and list, modifying sales form templates

MANAGING YOUR BUSINESS WITH QUICKBOOKS® PART 2 covers the following material:

- ✓ **Pass-Throughs:** Reimbursable expenses, using two-sided items, unbilled costs by job report, invoicing for billable time, time by job report, vehicle mileage tracking, multiple pass-throughs on one invoice
- ✓ **Inventory:** Tracking inventory, setting up inventory items parts and group items, calculating average cost, invoicing for and purchasing inventory, purchase orders, entering bills for inventory, adjusting inventory, inventory reports
- ✓ **Sales Tax:** Setting up sales tax, sales tax items and codes, calculating sales tax on sales forms, QuickBooks and your sales tax return, advanced sales tax topics
- ✓ **Time Tracking:** Entering time on timesheets, printing timesheets, timesheet data feeds payroll, invoicing customers for time, tracking an owner's or partner's time, time reports
- ✓ **Payroll Setup:** Payroll accounts, activating and set-up for payroll, employee defaults, employee records, year-to-date amounts, accounting behind-the-scenes in payroll items, releasing employees, deactivating and reactivating employees, employee contact list report, mid-year payroll setup
- ✓ **Payroll Processing:** Tax tables, paying employees, editing, voiding and deleting paychecks, paying payroll liabilities, creating payroll reports, preparing payroll taxes
- ✓ **Estimates and Sales Orders:** Creating estimates and sales orders
- ✓ **Budgeting, Forecasting, and Business Planning:** Creating budgets and budget reports, creating forecasts and forecast reports, cash flow projector, creating a business plan
- ✓ **Adjustments and Year-End Procedures:** Processing Form 1099, editing, voiding and deleting transactions, recording adjustments and general journal entries, tracking fixed assets, memorizing journal entries, closing the year, "locking" transactions, importing and exporting

\$295 per student

Workshop Fee includes lunch, full day of training, and a student instruction manual for you to keep for reference

CPE certified!

These workshops are certified for 7 hours of Technical Business credits

On-Site Workshops

Schedule an on-site workshop for your employees for only \$1,495. Half-day sessions are also available for \$895.

Contact us for the schedule of upcoming training workshops in your area

QUICKBOOKS® SUPPORT SERVICES

QuickBooks® is easy to use, but with hundreds of features, you're likely to have questions. With an Annual Quick-Access Support Plan, you'll have direct access to our experts who can help you quickly and cost-effectively – whether you have a question about a specific feature or need help with an unexpected issue.

With 15 hours of support covered in this annual plan, you can have the peace of mind that you will have access to a Certified QuickBooks® Pro Advisor who knows you and your business. The benefit of our Quick-Access Support Plan is that you have several methods of support available to you, including remote assistance, email support, and telephone support.

Remote assistance through third-party software (WebEx) consists of online access to your computer and files from our office or anywhere with internet service. Security settings make this support option secure. Remote access facilitates the training process for new users, and provides a viable support method for those tricky questions that simply cannot be resolved over the phone.

For \$1,350 per year, you are assured timely and expert support for all of your QuickBooks needs, up to 15 hours per year. Onsite support is available at our hourly rates, which range from \$115 - \$225.

TELEPHONE SUPPORT PLANS

Telephone support plans may be purchased at any time throughout the year. These plans are geared toward the confident and advanced QuickBooks user who is less likely to have many questions throughout the year.

- ✓ Pay-per-quarter-hour telephone support - \$30 per quarter hour
- ✓ 3 hours of telephone support - \$315 annually
- ✓ 6 hours of telephone support - \$600 annually
- ✓ 10 hours of telephone support - \$950 annually

We are committed to providing you with the service you need. If one of the above support plans does not meet your needs, please let us know. We will determine a support plan that makes the most sense for your company.



\$1,350

*Annual Quick-Access Support Plan
15 hours of support services*

\$950 per year

10 hours of telephone support

\$600 per year

6 hours of telephone support

\$315 per year

3 hours of telephone support

\$30

Telephone support per quarter hour

BOOKKEEPING/BACK OFFICE SERVICES

Our goal is to simplify and improve the financial lives of our small business clients. Because each company's needs are different, we tailor our services specifically for you. Services are provided by an experienced Daszkal Bolton professional who will gain an intimate knowledge of your company's values and cultures before working with you.

We work closely with you to develop a customized control system so that you are comfortable with our level of access for each service that you select. For your convenience, many of our bookkeeping services are provided at your office.

We offer a full range of bookkeeping and back-office accounting services, and would be happy to discuss any additional services that may help your company achieve a higher level of efficiency. Recurring outsourced bookkeeping engagements may entail any or all of the following services. Bookkeeping projects for accounting that needs to be caught up or cleaned up are also available.

- ✓ Timely payments of all vendor bills
- ✓ Monthly reconciliation of bank accounts
- ✓ Monthly reconciliation of credit card accounts
- ✓ Online banking and reporting
- ✓ Accounts payable
- ✓ Accounts receivable
- ✓ Job costing
- ✓ Collections and aging reporting
- ✓ General ledger and journal entries
- ✓ Write-up and general bookkeeping
- ✓ Inventory adjustments
- ✓ Cash disbursement
- ✓ Payroll preparation
- ✓ Sales tax tracking and payments
- ✓ Notary services
- ✓ Maintenance of files for paid bills, cash receipts, legal documents, tax information, and miscellaneous transactions
- ✓ Preparation of monthly accounting reports summarizing cash receipts and disbursements



Customized bookkeeping packages are available, based on your company's specific needs. Bookkeeping services are available at a 5% discount when the first 20 hours of services are pre-paid.

Hourly rates range from \$60 - \$75.

\$75 per hour
Bookkeeping Projects

\$60 per hour
Recurring Outsourced Bookkeeping

EXECUTIVE SEARCH SERVICES

Our in-house recruitment specialist provides professional recruiting services for our clients who seek top-level financial management positions, such as a Controller or CFO, in addition to entry-level and mid-range accounting positions, such as bookkeepers and internal accountants. We have helped clients in a variety of industries (including medical, hospitality, real estate, construction and law firms) fill their accounting roles with high quality personnel.

Our network of contacts in the accounting industry allows us access to professionals who may not be “on the market” for a new position, and therefore would not be accessible by recruiting agencies and headhunters. We maintain a database of current resumes and advertise for specific placements to ensure that you receive the highest quality candidate available on the market. Our recruiting services are designed to take the pressure off of you - we perform the screenings, interviews and reference checks for you. You are brought in on the process once the candidates have been narrowed down to the most impressive few. We coordinate your participation in the final interviews and then you ultimately make the hiring decision.

What do we look for in financial management and accounting professionals? The top five factors we consider before recommending a candidate are:

- ✓ Skill sets / technical ability
- ✓ Personality / communication skills
- ✓ Work ethic / integrity
- ✓ Compatibility / culture match
- ✓ Commitment / loyalty

Recruiting firms often charge up to one half of the hired person’s annual salary, depending on the level of the position filled. Our recruiting costs are based upon the time it takes to make a successful placement. Due to our large network of contacts, up-to-date database and multi-layered recruiting approach, we are often able to fill your accounting positions very quickly with an accounting professional who has just the right kind of experience.

If you are seeking a financial management executive or mid-level accounting professional, consider using a source that has your best interests in mind. Your success is our business – we are invested in helping you find the best candidate for your internal financial needs. We are confident that you will find us to be the most responsive, confidential, and valuable source to help you recruit your financial management and accounting professionals.



Customized consulting packages are available, based on your company’s specific needs.

Hourly recruiting rates range from \$150 to \$250, depending on the position being filled.

WHAT OUR CLIENTS ARE SAYING

“We had originally converted to Great Plains Dynamics when faced with the problems of Y2K. Great Plains was fine for our basic accounting needs, but after a few years we realized that the software had a limited value because of its inability to handle our complicated accounting set up. We have 100 employees, several thousand customers and vendors, eight locations handling manufacturing and service requiring assembly files and service agreements... It was a big decision to tackle a second conversion, but we decided to move our accounting to QuickBooks and incorporate new service software. We began our conversion with another Pro Advisor and as we struggled to get the data converted and the system up and running, we realized that we had picked the wrong advisor. Amy stepped in and picked up the pieces, and the quick progress we’ve made is amazing. I don’t know how to thank you for making this process so easy... we’ve worked with the worst and now we’ve worked with the best!”

G. Kiley De Haven

General Manager - Aquatic Systems, Inc.

"Amy Vetter acted as a personal instructor to our bookkeeper at Leadership Broward, and as a result, the audit preparation was quick and efficient. Her competence and professionalism bring excellent quality to her work."

Anne Hotte Berry

Executive Director - Leadership Broward Foundation, Inc.

“I had been a QuickBooks user for nearly a decade when, as the sole office person, the number of accounts and entities had become cumbersome and reporting was sluggish at my level of experience. Amy helped me retool the chart of accounts to better enable me to report. She formulated a comprehensive budget and later encouraged the use of Enterprise to help with multiple-company reporting. As my boss’ endeavors became even larger, she took over the accounting for the investments. She is invaluable and brings experience, professionalism and consistency to the work she handles for me. She gives me the confidence of a second pair of hands and eyes. She is a great asset to have.”

Sharon Kelts

Blue Hull Enterprises, LLC

“The bookkeeping services have been most beneficial to our business. We have no desire to perform daily bookkeeping and office management tasks. Tina keeps us organized, has completely taken on our business as her own, and has full knowledge of our inventory and files. We are so relieved! Tina is our eyes and ears for our office management and bookkeeping. She is very organized, very smart, and very knowledgeable. She can always find a specific document when I need it. Tina is a great addition to our team!”

Kenneth Bowen

KKDA Investments Inc.

“The support was top notch. We received quick responses to our questions. For an implementation, this is the best I’ve seen. Thanks!”

JoAnn M. Ackerman

Vice President Finance & Administration - Nassau Paradise Island Promotion Board



“There have been numerous times when I’ve had to reach out to Amy to discuss operational account strategies for our company. Amy’s vast knowledge and consultation has been extremely valuable to us in making key financial decisions. As a small business, it is nice to know that we have such a great resource when we need it and one that understands our business intimately. She is a great partner in helping us focus on the things that help us grow our business.”

Mary Frandsen

OTB Architectural Elements, Inc.

“I am a very difficult person to please. Amy has done a good job of being aware of my character and working to ensure that I am happy with the QuickBooks training she has provided to me and my staff. She has also provided basic accounting and book-keeping services for our company. In just the last two years, she has seen us grow from a small firm keeping all our data in paper files, to now having practically all our operational functions entered into QuickBooks. We are quite pleased with our operational effectiveness now... Amy and her company have helped us get to where we are today.”

Earl Rynerson

Clad Tile & Stone

ADDITIONAL VALUE

Our firm provides a full range of financial services. For additional information about any of the following areas, please contact us.



AUDIT & ACCOUNTING SERVICES

- ✓ Audit and Review Services
- ✓ Assistance in Initial Public Offerings
- ✓ Analytical Reviews
- ✓ Sarbanes-Oxley Compliance Assistance

TAX SERVICES

- ✓ State & Local Tax Analysis and Exemptions
- ✓ Cost Segregation Analysis
- ✓ Real Estate Tax Planning and Consulting
- ✓ Executive Compensation Programs

ESTATE PLANNING

- ✓ Fiduciary Accounting
- ✓ Family Limited Partnerships
- ✓ Financial Planning
- ✓ Retirement Planning

LITIGATION & VALUATION SERVICES

- ✓ Dissolution of Marriage
- ✓ Purchase Price Allocations
- ✓ Charitable Donations
- ✓ Partnership Dissolutions
- ✓ Mergers and Acquisitions
- ✓ Divestitures

ACQUISITION ASSISTANCE

- ✓ Due Diligence
- ✓ Obtaining Financing
- ✓ Merger and Acquisition Assistance
- ✓ Strategic Alliances

FINANCIAL PLANNING

- ✓ Investment Portfolio Analysis
- ✓ Insurance
- ✓ Retirement Planning